

## Real-Time with Transformation Station for Applied TAM

Real-Time provides a link between your agency's and the carrier's system. The "Rate" feature gives the agent user the ability to quote new business by utilizing the Transaction Option of Rate to bridge over ACORD application information.

Currently, CompWest has the ability to offer real-time rating.

The **Rate** transaction will bridge your application into CompWest's eLink system for new business quotes. It will pre-fill as many fields as possible leaving only a few additional items that must be validated or entered to calculate the premium.


There are 4 main items you must update to use these features:

1. Policy number format
2. Agent Code
3. NAIC Code
4. Transformation Station update/security setup

### Policy Number Format **\*\*for real-time inquiries (Coming Soon)**

Policy number is the main item used to match documents in the CompWest System. The policy number format utilized is the prefix and main 7 numbers with no spaces.

Example: WCV5012345

 3 HUTTON CENTRE DRIVE STE 550 SANTA ANA, CA 92707-8724		<b>Workers Compensation and Employers Liability Insurance Policy</b>	
		<b>Policy Number</b>	<b>Policy Period</b>
		From	To
		WCV 59	05/05/2015 05/05/2016 12:01 A.M. Standard Time at the described location
<b>Transaction</b>			
INFORMATION PAGE NEW BUSINESS		<b>Agency code will need to entered as it appears on the policy dec page e.g. 5012345</b>	
<b>Named Insured and Address</b>		<b>Agent</b>	
		Telephone: 502	
<b>Other Workplaces Not Shown Above:</b>		See schedule attached	
<b>Extended Named Insured:</b>			
<b>Interstate ID:</b>		<b>Intrastate ID:</b>	
<b>Insured Is:</b> ASSOCIATION		<b>FEIN #:</b>	
<b>Bureau/Risk ID:</b>		<b>NCCI #:</b>	
<b>Unemployment Id Number:</b>			
ITEM 2. POLICY PERIOD is from 12:01 A.M., 05/05/2015 to 12:01 A.M., 05/05/2016 Standard Time at the			

### Agent Code and NAIC Codes

From the Applied system, select Clients and Files. From the Drop Down, select Companies.

A list of Companies will appear. Select CompWest.

Make sure your agency code is entered in the following formats 5012345 (this information can be found on a policy dec page) and the NAIC code: 12177

The screenshot shows the 'Company Detail' form with the following fields and values:

- Name: CompWest Insurance Company
- Attn: [Empty]
- Street: 3 HUTTON CENTRE DRIVE STE 550
- City: SANTA ANA State: CA
- Zip: 92707-8724
- Email: [Empty]
- Notes: [Empty]
- Phone: [Empty]
- Fax: [Empty]
- Company #: CPW
- DMV Code: State [Empty] Code [Empty]
- Company Type:  Carrier,  Regular,  Broker,  Excess/Surplus Lines
- Pay Mode:  Company Statement,  Agency Account Current
- Bill Modes:  Direct,  Agency
- Installments:  Use Pennies,  No Pennies, Add to 1st,  No Pennies, Add to Last
- Commission:  Percent,  Flat Amt
- Billing: CPW, CompWest
- Master: CPW, CompWest
- Allow at Billing Screen:
- Agency Code: 5012345 (highlighted)
- Best's Rating: [Empty]
- Foreign Code: [Empty]
- NAIC Code: 12177 (highlighted)
- Pay on: 0 of each month
- Buttons: OK, Options, Cancel

Make sure your agency code is entered, and the NAIC code: 12177

Click on **Options**

This screenshot is identical to the one above, but the 'Options' button is highlighted in yellow, indicating the next step in the process.

Select Agency codes.

COMPANIES  
Company Detail

Name: CompWest Insurance Company  
Phone: \_\_\_\_\_  
Alt: \_\_\_\_\_ Fax: \_\_\_\_\_  
Street: 3 HUTTON CENTRE DRIVE STE 550  
City: SANTA ANA State: CA  
Zip: 92707-8724  
Email: \_\_\_\_\_  
Notes: \_\_\_\_\_

Company #  
CPW

DMV Code  
State: \_\_\_\_\_ Code: \_\_\_\_\_

Company Type  
 Carrier  Regular  
 Broker  Excess/Surplus Lines

Pay Mode  
 Company Statement  
 Agency Account Current

Bill Modes  
 Direct  
 Agency

Billing: CPW CompWest  
Master: CPW CompWest  
 Allow at Billing Screen

Instalments  
 Use Pennies  
 No Pennies, Add to 1st  
 No Pennies, Add to Last

Commission  
 Percent  
 Flat Amt

Agency Code: 5020783  
Best's Rating: \_\_\_\_\_  
Foreign Code: \_\_\_\_\_ NAIC Code: 12177

Pay on 0 of each month

Archives  
Listings Menu  
Sticky Menu  
Company Address  
Commission Defaults  
Call History  
**Agency Codes**  
Disbursement W...  
myTAM  
Links  
Create Label

MIG Merchants Insurance Group  
NDR Northbrook Prop. & Casualty  
PEK Pekin Insurance Company  
PEN Pennsylvania National Ins. Co.  
PHX Phoenix Insurance  
PRO Progressive  
RFI Reliance Insurance Company

You must enter your agent code in for: Code, Password and Contract.

Click **Update**

To close the window Click **Cancel**

COMPANIES  
Company Detail

Name: CompWest Insurance Company  
Phone: \_\_\_\_\_  
Alt: \_\_\_\_\_ Fax: \_\_\_\_\_  
Street: 3 HUTTON CENTRE DRIVE STE 550  
City: SANTA ANA State: CA  
Zip: 92707-8724  
Email: \_\_\_\_\_  
Notes: \_\_\_\_\_

Company #  
CPW

DMV Code

Company Type  
 Carrier  Regular  
 Broker  Excess/Surplus Lines

Pay Mode  
 Company Statement  
 Agency Account Current

Bill Modes  
 Direct  
 Agency

Billing: CPW CompWest  
Master: CPW CompWest  
 Allow at Billing Screen

Agency Code: 5020783  
Best's Rating: \_\_\_\_\_  
Foreign Code: \_\_\_\_\_ NAIC Code: 121

Company Agency Codes

Company Code: CPW Company Name: CompWest

Transmitting  
 Print/Transmit by Agency  Print/Transmit by Branch

Agency/Branch Information

Ag	Name	Code	Password	Contract
1	The Agency Manager, Inc.	5020783	5020783	5020783

Code: 5020783 Password: 5020783 Contract: 5020783

Update Cancel

The Travelers Insurance Co.  
Western Surety



Select the Real-Time Interface icon.

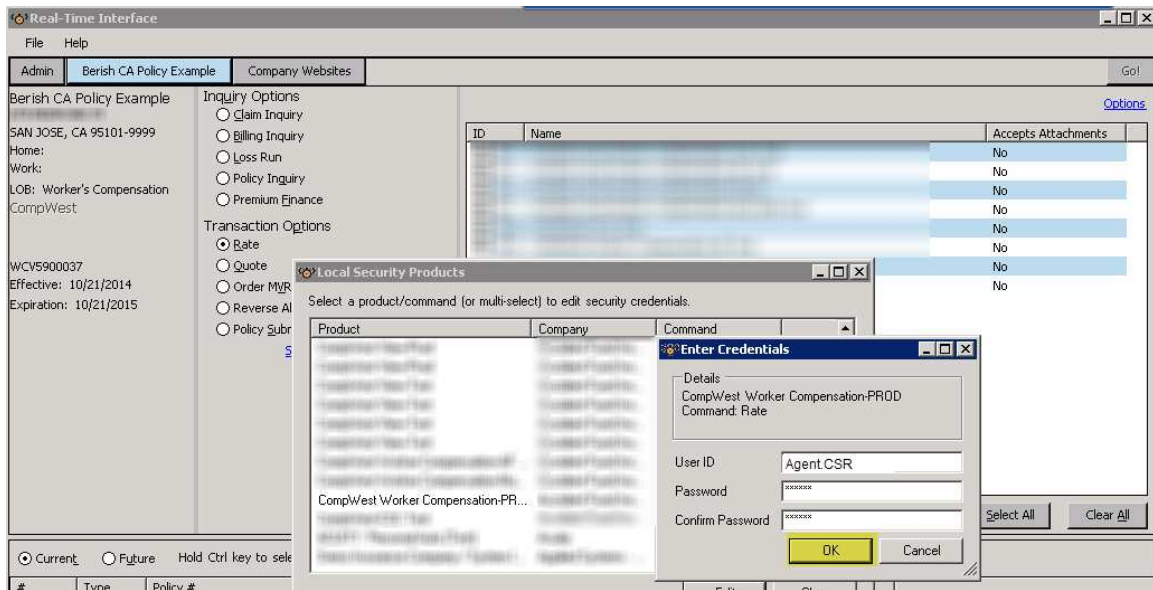
From the top left corner, select File and Local Security Products.

Select (highlight) CompWest and click on **Edit**.

You must enter your user id and password.

Click **OK** to complete the process.

Click **Close** to close the Local Security Products window.



If you need assistance, or have questions, please contact the IT Service Center at:  
Phone: 517-708-5700  
Toll Free: 866-206-5851